

How to: Record Mental Health, Substance Abuse, & Domestic Violence Assessments & Referrals in CAREWare

Requirements:

- All Part B case management agencies are required to enter the assessment results for any client receiving a case management intake service.
- All MHSA/DV assessments and results must be entered in CAREWare as described below, regardless of the outcome of the assessment.
- Any referral resulting from this assessment must be entered and tracked in CAREWare using the Referrals tab.

Follow these steps to enter assessment outcomes, referrals, and to follow-up on referrals.

1. Use the Find Client option from the main CAREWare menu to locate the client the assessment was completed on.

Once in the client's record, select the Encounters tab.

Click Create Encounter and set the encounter date to the date of the assessment.

The screenshot shows the CAREWare interface with the 'Encounters' tab selected. The 'Create Encounter' button is highlighted with a red box. Below the button, there are fields for 'Encounter Date' (08/18/2009) and 'Southwe'. A 'Vital Signs' section is visible below the encounter creation area, with fields for Height, Weight, Pulse, Temperature, and B.P. Sys/Dia. A 'Pregnant?' section is also present with checkboxes for 'Last visit' and 'Currently'.

2. After setting the encounter date, click on the Screenings tab.

The mental health, substance abuse, & domestic violence assessment results will be entered on this tab; any assessment completed on the date you set the encounter to should be entered under the same encounter date.

You should **not** add a new encounter for each assessment if they were completed on the same date.

3. Add each assessment result by clicking on the name of the assessment in the Current Test box and filling in the appropriate information. Press the SAVE button after entering each assessment.

The names of the Current Tests you will be using are:

Mental Health Assessment
 Substance Abuse Assessment
 Domestic Violence Assessment

Each assessment will include a Current Result and a Current Action. Refer to the table below for the appropriate Actions to match with each possible Result.

Current Result	Current Action
Referral Indicated	Referral Accepted Referral Not Made - No Interest Referral Not Made - No Resource Referral Not Made - No Appt Available
No Referral Indicated	No Referral Indicated

For example, if your client's MH assessment indicated that a referral is needed and the client accepts the referral, you would select "Referral Indicated" for the Current Result and "Referral Accepted" for the Current Action.

If a client has a referral indicated by their assessment but will not receive a referral for any reason, then select a Current Action that reflects why a referral is not given.

Current Test: Domestic Violence Assessment
 Current Result: Referral Indicated (S)
 Current Action: **Referral Not Made - No Interest (Referral)**

Test: Domestic Violence Assessment
 Date of Prior Test:
 Prior Result:
 Geno/Pheno
 History of sexual activity (adolescent)

- After saving each assessment, you should see it in the screening test summary. If it doesn't appear, it has not been saved.

Screenings

Test	D.	Pri...	Pri...	Current Result	Current Action	Comment
Domestic Violence Screening				Referral Indicated (Screening Re...	Referral Not Made - No Interest...	
Geno/Pheno						
History of sexual activity (adolescent)						
Mental Health Assessment				Referral Indicated (Screening Re...	Referral Accepted (Referral)	
Rectal Pap Smear						
Substance Abuse Assessment				No Referral Indicated (Screening ...	No Referral Indicated (Referral)	
TB Chest Radiograph						
TST						

Very Important:
 If CW asks if you want to create a
 Primary Care service when clicking away
 from the Encounters tab,
 always click **NO**.

Quality Check

Do you want to enter a Primary Care service for the new encounter on 08/31/2009?

Yes No

5. After the assessment results are entered, any assessments resulting in an accepted referral **must** have that referral entered using the Referrals tab. You don't need to enter anything on the Referrals tab for clients who did not initially receive a referral for any reason.

The screenshot shows the 'Referrals' tab selected in the top navigation bar. Below the navigation bar, there are three sub-tabs: 'Received Internal Referrals', 'Outgoing Internal Referrals', and 'External Referrals'. The 'Add/Edit Referral Information' section contains several fields: 'Refer-To Provider' (a dropdown menu), 'Add' (a button), 'Referral Status' (a dropdown menu), 'Referral Date' (a date picker), 'Referral Class' (a dropdown menu), 'Requested Service Category Type' (a dropdown menu), 'Referral Complete Date' (a date picker), and 'Referral Comments' (a text area). There are 'Save' and 'Cancel' buttons at the bottom right of this section. Below this section is a table with columns: 'Refer-To Provider', 'Requested Service Category...', 'Referral Status', 'Referral Date', and 'Referral Complete Date'. At the bottom of the window, there are three buttons: 'New Referral', 'Edit Referral', and 'Delete Referral'. A mouse cursor is pointing at the 'New Referral' button.

The majority of referrals made will be to providers outside of the HAP CAREWare network, so you will enter them using the **External Referrals** tab within Referrals.

After clicking on Referrals and then External Referrals, click **New Referral** to begin entry.

The screenshot shows the 'External Referrals' tab selected in the top navigation bar. The 'Add/Edit Referral Information' section is identical to the one in the previous screenshot. Below this section is a table with columns: 'Refer-To Provider', 'Requested Service Category...', 'Referral Status', 'Referral Date', and 'Referral Complete Date'. At the bottom of the window, there are three buttons: 'New Referral', 'Edit Referral', and 'Delete Referral'. A red box highlights the 'New Referral' button, and a mouse cursor is pointing at it.

6. Complete the referral fields for the initial referral.

Every referral initially entered should have:

Refer-to Provider

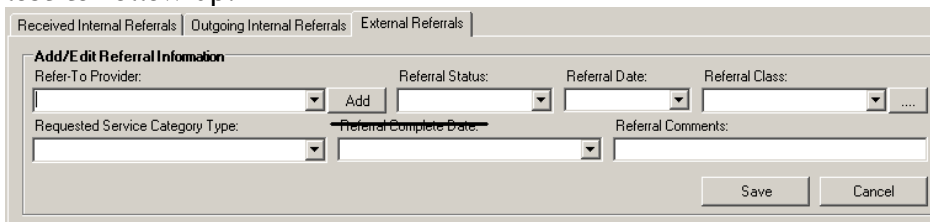
Referral Status

Referral Date

Referral Class

Requested Service Category Type

You will **NOT** enter the Referral Complete Date until the referral has been completed or the client is lost-to-follow-up.

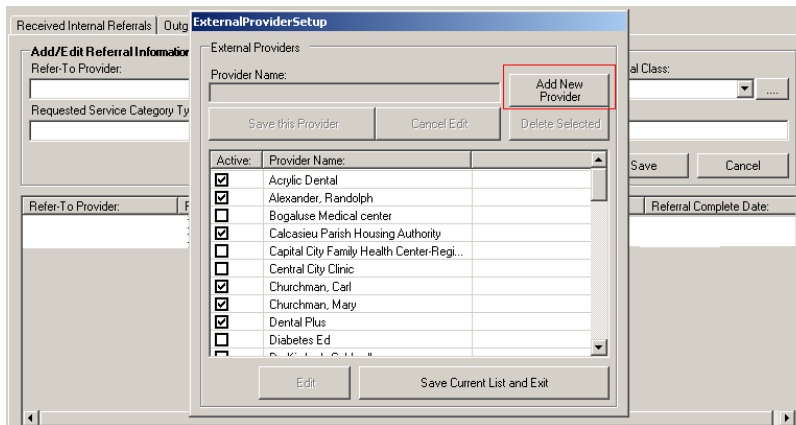


Refer-To Provider

This is the provider you are referring the client to. The **Add** button next to this field should be used to set up the names of the providers used for referrals.

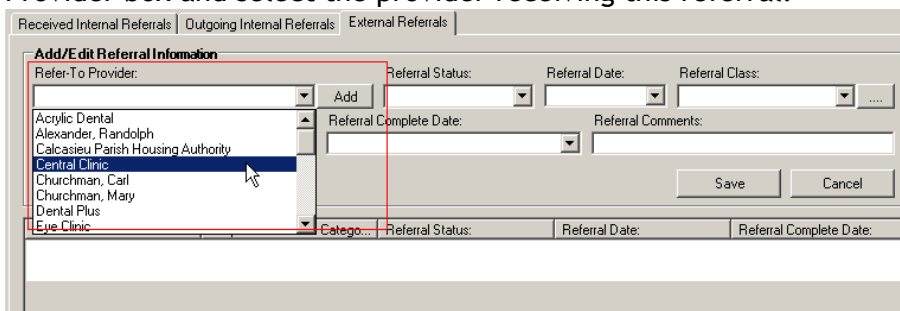
To add providers:

- a. Click Add and then Add New Provider on the External Provider Setup box that appears



- b. Enter the name of the provider receiving the referral and click Save This Provider.
- c. Click Save Current List and Exit button to return to the referral entry screen.

After you've added any providers not already on the list, click the down arrow next to the Refer-To Provider box and select the provider receiving this referral.



Referral Status

When initially made, all referrals will be **Pending**. You will change this status again when there is an outcome for the referral.

The screenshot shows the 'Add/Edit Referral Information' form. The 'Referral Status' dropdown menu is open, showing options: Pending, Completed, Lost to follow up, and Rejected. The 'Pending' option is highlighted. The form also includes fields for 'Refer-To Provider' (Central Clinic), 'Referral Date', 'Referral Class', 'Requested Service Category Type', and 'Referral Comments'. There are 'Add', 'Save', and 'Cancel' buttons.

Referral Date

This is the date you make the referral for the client. It is usually the same date as the assessment.

Referral Class

Select the option that reflects what assessment this referral is related to. Since CW does not automatically link referrals and encounters, this field is used to show that the referral is tied to an assessment.

The screenshot shows the 'Add/Edit Referral Information' form. The 'Referral Class' dropdown menu is open, showing options: Corrections, Housing, MH - MHSA Assessment Referral, MH & SA - MHSA Assessment Referral, Referred from HAP, and SA - MHSA Assessment Referral. The 'MH - MHSA Assessment Referral' option is highlighted. The form also includes fields for 'Refer-To Provider' (Central Clinic), 'Referral Status' (Pending), 'Referral Date' (8/31/2009), 'Requested Service Category Type', 'Referral Complete Date', and 'Referral Comments'. There are 'Add', 'Save', and 'Cancel' buttons.

Referral Type	Referral Class
Mental Health	MH - MHSA Assessment Referral
Substance Abuse	SA - MHSA Assessment Referral
Domestic Violence	Domestic Violence Referral
Mental Health AND Substance Abuse (if need was indicated for both and if referred to same provider for both)	MH & SA - MHSA Assessment Referral

Requested Service Category Type

This field should reflect the HRSA Ryan White service category corresponding with the referral being made. Service units are not assigned, only a category.

Referral Type	Service Category
Mental Health	Mental Health Services
Substance Abuse	Substance Abuse: Outpatient
Domestic Violence	Non-Medical Case Management

An initially completed MH assessment referral should look like this:

The screenshot shows a web application interface with three tabs: 'Received Internal Referrals', 'Outgoing Internal Referrals', and 'External Referrals'. The 'External Referrals' tab is selected. Below the tabs is a form titled 'Add/Edit Referral Information'. The form contains several fields: 'Refer-To Provider:' with a dropdown menu showing 'Central Clinic' and an 'Add' button; 'Referral Status:' with a dropdown menu showing 'Completed'; 'Referral Date:' with a date picker showing '8/31/2009'; 'Referral Class:' with a dropdown menu showing 'MH - MHSA Assessment R' and an ellipsis button; 'Requested Service Category Type:' with a dropdown menu showing 'Mental Health Services'; 'Referral Complete Date:' with an empty dropdown menu; and 'Referral Comments:' with a text input field. At the bottom right of the form are 'Save' and 'Cancel' buttons.

Notice that the Referral Complete Date is left BLANK.

Click the SAVE button once you have entered all of the information.

7. **Entering outcome for referrals:** Once a client has either been to their referral appointment, is considered lost-to-follow-up, or has later refused the referral, you will go back to the client's External Referral screen in CW to update the referral.

Once on the same client's External Referrals screen, click on the referral you are updating and click Edit Referral.

Change the **Referral Status** to the correct outcome and then enter the date that the referral outcome was made as the **Referral Complete Date** (the date the client went to the appointment, was considered lost-to-follow-up, or refused the referral).

Click SAVE and make sure the updated information appears in the referrals summary.

This screenshot shows the same 'Add/Edit Referral Information' form as the previous one, but with updates. The 'Referral Status:' dropdown now shows 'Completed' (highlighted with a red box). The 'Referral Complete Date:' dropdown now shows '9/10/2009' (highlighted with a red box). The 'Referral Date:' remains '8/31/2009'. Below the form is a summary table with the following data:

Refer-To Provider:	Requested Service Category Type:	Referral Status:	Referral Date:	Referral Complete Date:
Central Clinic	Mental Health Services	Pending	8/31/2009	